

**New Account Setup Questionnaire**

Office Name: \_\_\_\_\_

What is the main office phone number? (This number will appear on your patients' caller-ID)

eg. (555) 111-2222 \_\_\_\_\_

Via what e-mail address would you like to receive voice messages left by your patients?

\_\_\_\_\_

During voice calls, how should we identify ourselves to the caller?

eg. Hello, this is Mapleview Dental calling to remind ...

Hello, this is \_\_\_\_\_ calling to remind ...

In what timezone is your office located? \_\_\_\_\_ eg. EST (-5hrs)

When do you want PromptAlert to confirm your appointments via voice?

<b><u>Day of Appointment:</u></b>	<b><u>Confirm them on:</u></b>	<b><u>Starting at:</u></b>
eg: Monday	Friday	12:00PM
	(i.e. confirm Monday appointments Friday starting at Noon)	

<b>Monday</b>	_____	_____
<b>Tuesday</b>	_____	_____
<b>Wednesday</b>	_____	_____
<b>Thursday</b>	_____	_____
<b>Friday</b>	_____	_____
<b>Saturday</b>	_____	_____
<b>Sunday</b>	_____	_____

How many days in advance of the appointment do you want to send e-mail reminders?

Default: 7 days \_\_\_\_\_ Do not send email \_\_\_\_\_

How many hours in advance of the appointment do you want to send a text message to the client?

Default: 1.5 hrs \_\_\_\_\_ Do not send SMS \_\_\_\_\_

How many days' notice do you require from your patients for appointment cancellations?

eg. 2 days \_\_\_\_\_

Should we confirm appointments booked on the same day as the appointment? ('Short-Notice')

**Yes**      **No**

If you answered '**NO**' above, we will not be confirming 'short-notice' appointments.

How many hours in advance of an appointment do you consider 'short-notice'?

**24**      **48**      **72**      **other:** \_\_\_\_\_

If multiple family members have appointments scheduled in the same day, should we confirm them in the same call or place a separate call for each patient in the household?

Default: 1 call      **1 call** \_\_\_\_\_      **Separate calls** \_\_\_\_\_

During your calls, if we encounter an answering machine on the first try should we deliver your message or hang up and try the call again later?

Default: Leave message on 1st call      **1st call**      **2nd call**      **3rd call**

When delivering a message to an answering machine, should we specify that the patient needs to call your office back to confirm the appointment?

**No callback is required** \_\_\_\_\_      **Patient callback is required** \_\_\_\_\_